

**End User Guide Purpose**

This document serves as a complementary reference guide for the Project Investment Justification (PIJ) Form capturing help text content in one document.

This document aims to offset any Microsoft Word version compatibility issues. For your convenience, below are systematic procedures on how to adjust your version of Microsoft Word settings to activate the bookmarks within the PIJ Form and how to use the mouse to hover over each heading to read the tips within the Form.

**Microsoft Word Version Compatibility Management**

Depending on the version of your Microsoft Word product, the bookmarked items in the PIJ Form will have the ability to display instructions when using the hover feature. This feature can be utilized by holding the mouse over the help text and tips will then display. However, older version of Microsoft Word do not allow for this feature automatically. If you are working with an older version, please follow the following instructions to enable this feature:

**a. Microsoft Word 2003**

1. Click on 'Tools'
2. Select 'Options'
3. Choose 'View tab'
4. Select 'Show Group'
5. Select 'Bookmarks' and 'check box'
6. Click 'Apply' and 'Close'
7. Save your document to preserve these new settings

**b. Microsoft Word 2007**

1. Click on 'Office' button
2. Select 'Word Options'
3. Select 'Advanced'
4. Scroll to the 'Show Document Content' section
5. Select the 'Show Bookmarks' and 'check box'
6. Click 'Apply' and 'Close'
7. Save your document to preserve these new settings

**c. Microsoft Word 2010**

1. Click on 'File'
2. Select 'Options'
3. Select 'Advanced'
4. Scroll to 'Show Document Content' section
5. Select the 'Show Bookmarks' and 'check box'
6. Click 'Apply' and 'Close'
7. Save your document to preserve these new settings

*\* Items are required for Pre-PIJ Assessments*

## **I. Management Summary\***

Complete this section last to capture the essence of a top-level summary for the Project Investment Justification (PIJ) request. In this section you will want to apply thorough consideration to project objectives and goals, the methods and processes for executing the project's objectives and goals and identifying quantifiable information (measurable, assessable, and calculable). Include information that explains why the solutions identified are the optimal choice, and how the solutions will add value to the overall business needs of your agency. Note, this section is also required for a Pre-PIJ.

## **II. PIJ Type\***

### **a. Pre-PIJ/Assessment**

1. If yes, provide preliminary assessment information and funding needs. Add any costs incurred during the assessment phase under Project Values (Section VIII.B). After initial assessment, the PIJ will include full project details for final PIJ Approval.
2. If no, provide detailed information for a full PIJ and include financial and funding needs.

### **b. Request for Proposal (RFP)**

1. Selecting 'Yes' (applies to Pre-PIJ/Assessment Phase)  
Choose this option for projects that require an RFP and obtain approval for the RFP through your agency.
2. Selecting 'No' (applies to full PIJ request)  
Provide detailed information for a full PIJ and complete all elements of the document with as much detail as possible, including financial and funding needs.

## **III. Business Case**

### **a. Business Problem\***

Describe the problem the project intends to solve, and/or the business needs the project will address. This section is required for a Pre-PIJ.

### **b. Proposed Business Solution\***

Describe the proposed business solution by indicating the value-driven components, which will achieve the desired solutions to meet your business needs. Describe elements/changes to agency operations that will be implemented with the project. Information should include solutions to the business problem from a process perspective, which are tied to the technical solution below. This section is also required for a Pre-PIJ.

### **c. Quantified Benefits\***

Select all applicable benefits that justify and quantify the business needs (input measures and calculations that specifically highlight the benefits.) Describe the value for each of the benefits as they apply to the public and to the State. This section is required for a Pre-PIJ.

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**IV. Technology Approach****a. Proposed Technology Solution\***

Describe each of the technology components (i.e. software, hardware, and services) that encapsulate the proposed solution. Identify any vendor provided quotes and attach the quotes as an appendix or in a separate file as supporting documentation. This section is required for a Pre-PIJ.

**b. Technology Environment**

Describe how the proposed solution will integrate into or replace the current environment. Include the age and/or condition of the technology currently in use.

**c. Selection Process**

Describe the approach taken, including research and methodologies applied to reach the proposed solution.

**V. Project Approach****a. Project Schedule\***

Provide an estimated schedule for project implementation including the project start and end dates. An established project schedule with a project start-up timeline will follow, once the review process is complete. This section is required for a Pre-PIJ.

**b. Project Milestones**

Provide a top-level set of major tasks and deliverables for the project as critical paths for accomplishing specific components of the project timeline applied within the project start and end date timeframe.

**VI. Roles and Responsibilities****a. Project Roles and Responsibilities**

Identify key project roles and responsibilities, including the group/division within the agency that is sponsoring the project. Identify the project manager, the business and technical leads, and vendor resources.

**b. Project Manager Certification**

Select all items that apply to the project manager assigned to this project.

**c. Full-Time Employee (FTE) Project Hours and Costs**

If information is available, identify the FTE hours required to implement the project. Include Project FTE hours and FTE costs.

**VII. Risk Matrix, Areas of Impact, Itemized List, PIJ Financials Worksheets**

Reference the instructions spreadsheet tab in the Microsoft Excel embedded file.

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## VIII. Project Approvals

### a. **Agency CIO Review\***

This section must have a respective response of Yes or No. This response identifies key management information confirming the agency's CIO review and awareness of this PIJ. This section is required for a Pre-PIJ.

### b. **Project Values\***

Identify the below components using the input entered into the embedded Excel file for PIJ Financials, FTE Hours, and Assessment Costs. Assessment Costs are required for a Pre-PIJ.

### c. **Agency Approvals\***

Provide the names and contact details of all project stakeholders. Obtain signatures from all stakeholders identified. Agency Director approval is mandatory for projects over \$1M or more in development cost. This section is required for a Pre-PIJ.

## IX. Optional Attachments

### a. **Vendor Quotes**

Attach vendor quotes as a separate supporting document and submit with this request.

## X. Glossary

Provide a glossary of terms and/or acronyms for all data used in this document.

## XI. Additional Information

Provide any additional information not identified in other sections of this document but are necessary for all stakeholders to have or take into consideration. Examples include, but are not limited to data flows, network flows, and off-site vendor hosting connectivity flows.

**Submit Completed PIJ Form by email to [Strategic Oversight](#)**

*\* Items are required for Pre-PIJ Assessments*